



# Planon User Guide

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Facilities Maintenance Software

Version 2017.06

For any questions, please contact us at:  
[planonhelp@howardcountymd.gov](mailto:planonhelp@howardcountymd.gov)



## Planon User Guide

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# System Access

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Planon is the new Facilities Management work order system.

Customers can place their work requests directly through the Planon system to be addressed by our Operations and Maintenance Team.

In order to use the system, a one-time account setup and activation are required. To request activation, please email:

[planonhelp@howardcountymd.gov](mailto:planonhelp@howardcountymd.gov)

With the subject “**Activation Request**”. Please be sure to include your name and email in your request. Please also feel free to request activation for other users.

# Basic Login

Please log into the following website:

<https://howardco-prod.planoncloud.com>

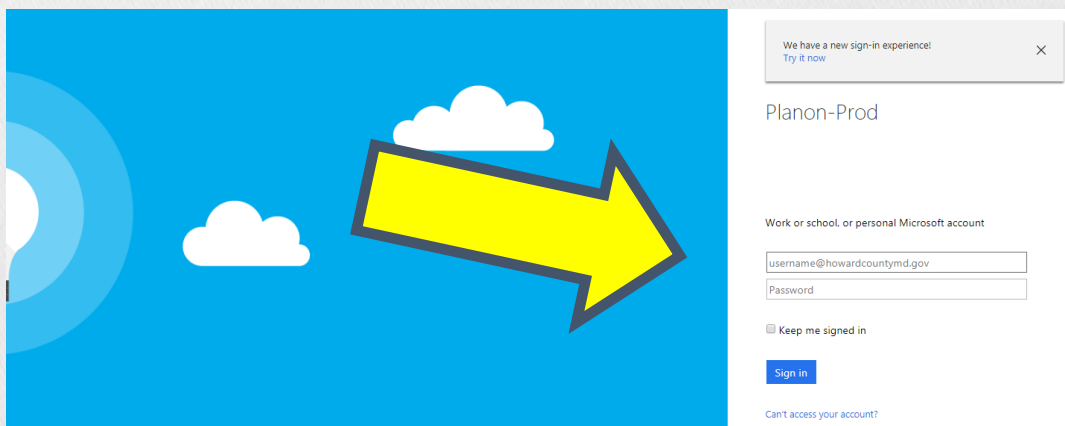
For Username, please type in your full email address.

**Please include the .gov suffix**

For howardcountymd.gov users, your password will be the same as your latest computer login / email password.

For other users, please contact [planonhelp@howardcountymd.gov](mailto:planonhelp@howardcountymd.gov) to set up an account, or reset a password.

(Note – this login screen is managed by Microsoft Azure, and may change in layout slightly.)



We have a new sign-in experience!  
Try it now

Planon-Prod

Work or school, or personal Microsoft account

username@howardcountymd.gov

Password

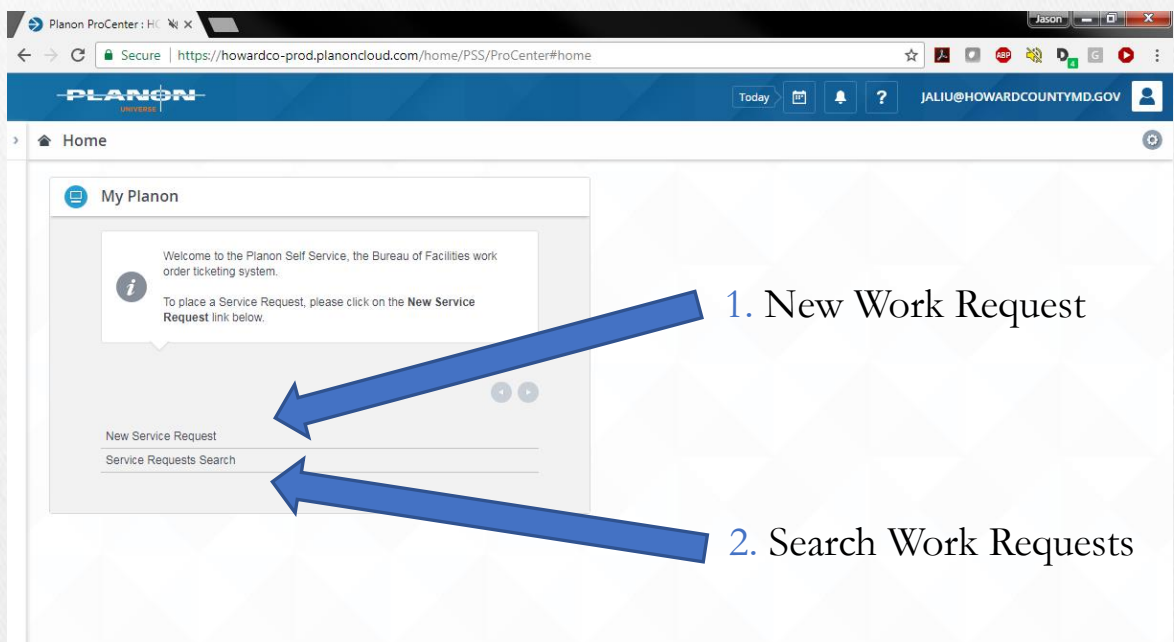
☐ Keep me signed in

Sign in

Can't access your account?



# Menu Navigation



1. Click Here to Create a New Work Request
2. Click Here to Search for Any Work Requests

# New Work Request

Please fill out all fields as indicated.

Additional hints are provided with the following icon:



Searchable fields are provided with the following icon:



By default, “Requestor” is automatically filled in.



# Existing Work Requests

Work Requests can be searched by any of the listed fields. By default, a search is performed on the current user (as a requestor). If multiple fields are filled, the search engine will look for orders that fulfill all fields as indicated. There are four valid status entries: Reported, In Progress, Completed, Cancelled.

The screenshot shows the Planon ProCenter web application. A modal window titled "Service Requests Search" is open, displaying a search form and a results table. The search form includes fields for Requestor (Jason Liu), Service Request Number, Property Name, Status, Specific Issue, and Reported On (with date pickers). A "Search" button is at the bottom of the form. The results table below shows a list of work requests with columns for Number, Description, Reported On, Status, Start Date & Time, and End Date & Time. The table contains 5 rows of data, with the first row highlighted. The status of the requests is: Reported, In progress, Completed, In progress, and In progress.

Number	Description	Reported On	Status	Start Date & Time	End Date & Time
3553.00	test issue name	9/18/2017 10:37	Reported		
3551.00	jason test delete me subject	9/15/2017 14:49	In progress		
3550.00	test issue subject	9/12/2017 14:15	Completed		
3549.00	specific issue test	9/12/2017 09:07	In progress		
3548.00	test - jason air handler	9/11/2017 13:48	In progress		

# Email Notifications

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Planon keeps requestors up to date on the status of their requests.

At each of the four phases of the request process, a notification email is sent, with relevant information regarding their request:

## **1. Request in Progress**

This email is a receipt, to confirm with users that their request has been logged into the system.

## **2. Request in Progress**

Once a Work Request has been assigned to a Operations team member, this email is sent to the original requestor, to let them know who the work has been assigned to.

## **3. Request Completed**

Once a Work Request has been completed, this email is sent to the original requestor, with a link to the customer satisfaction survey.

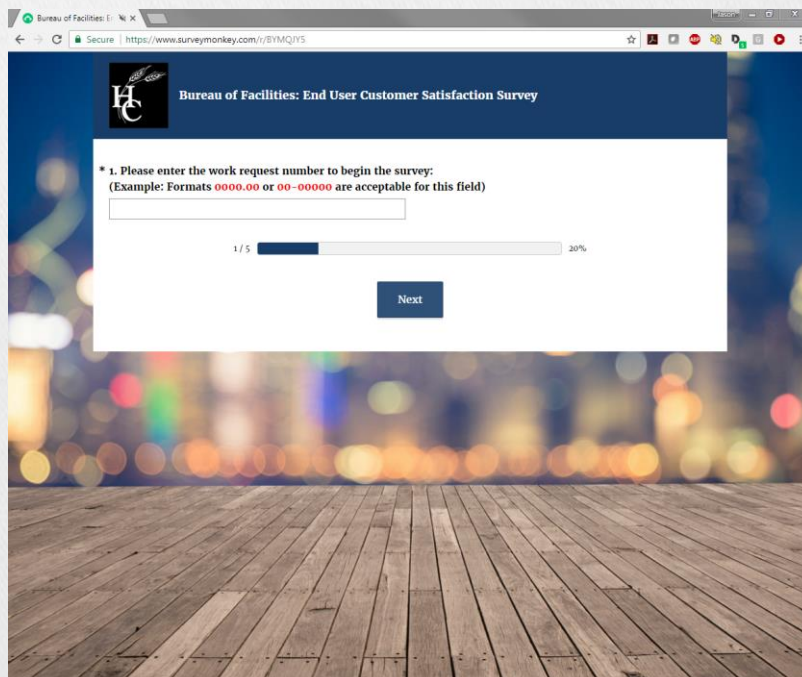
## **4. Request Cancelled**

If work has been cancelled, this email is sent to the original requestor, to inform them that their request has been cancelled, with reason of the cancellation given.



# Customer Satisfaction Survey

Included in the “Request Completed” email is a link to our Customer Satisfaction Survey. To help better improve our customer relations, we regularly monitor the responses and adjust our service accordingly. We also use these surveys to give credit and thanks to our hard working team.



The screenshot shows a web browser window with the URL <https://www.surveymonkey.com/r/BYMQJY5>. The page title is "Bureau of Facilities: End User Customer Satisfaction Survey". The form is titled "Bureau of Facilities: End User Customer Satisfaction Survey" and features a logo with the letters "HC". The first question is: "1. Please enter the work request number to begin the survey: (Example: Formats 0000.00 or 00-00000 are acceptable for this field)". Below the question is a text input field. A progress bar indicates "1 / 5" and "20%". A "Next" button is located at the bottom of the form. The background of the survey page is a blurred image of a wooden floor and colorful bokeh lights.